



The Marketing Conference

Progress With Purpose

May 29 — 31, 2019 • Westin Boston Waterfront • Boston, MA

WEDNESDAY, MAY 29

FIRST-TIMERS' ORIENTATION — 1:15 to 2:00 p.m.

(For LIMRA Members Only)

Calling all first-time attendees! Let us help you get the most out of your overall conference experience. Join the members of the Marketing Committee to:

- Receive guidance on choosing the best sessions and tracks to meet your personal objectives
- Get answers to any questions you have about making the most out of the conference
- Network with other industry marketers
- Take a tour of the new LIMRA.com website and gain access to a wealth of industry information
- Share snacks, meet new friends, and have fun!

MEET AND GREET — 2:00 to 2:30 p.m.

Join us as the conference begins to meet and greet peers while you share ideas and common experiences.

GENERAL SESSION — 2:30 to 3:40 p.m.

Adopting a Marketing Mindset for the Modern Digital World



TOM FISHBURNE

Creator of Marketoonist and Author of "Your Ad Ignored Here"

These are the awkward adolescent years of digital marketing. With every new wave of technology, marketers can connect with their audience more directly and deeply than ever before. But organizations have not completely kept pace with the potential brought by technology. Many marketers adopt new tools while still following a Mad Men-era playbook. This talk will frame the right marketing mindset needed to take advantage of the modern digital world.

REFRESHMENT BREAK — 3:40 to 4:00 p.m.



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CONCURRENT WORKSHOPS — 4:00 to 5:00 p.m.

1. Brand Storytelling — How to Craft a Story That Captures Attention

Humans are hardwired for stories — we can't resist them. But if you want to be heard in today's era of digital distraction, even compelling stories aren't enough. Learning how to tell micro stories and storylines — short, memorable stories that quickly capture attention — can be your most powerful tool. In this session, you will learn the five-step-formula for powerful micro storytelling and participate in interactive exercises to help you design stories that break through the noise, capture attention and improve your results. You'll see real-world examples that show how micro stories can transform everything from email marketing to dense data.

BETSY HUBBARD, Founder and President, Mindset Digital; **Moderator: STEVE WENDORF**, Director of Marketing, Catholic United Financial

2. Digital Generation — Bringing Print to Life!

When Internet marketing was still in its infancy, many pundits predicted online marketing would spell the demise of print and direct mail. They not only remain viable, but their ROI continues to rise and outpace email, while more and more email blocking technology is being developed and implemented. Join the discussion on the many ways organizations are "bringing print to life" and allowing prospects and customers to further interact with their marketing messages.

ART CALAMARI, Vice President, Strategic Accounts, Taylor Communications; **Moderator: MATHEW NELSON**, Marketing Consultant, MassMutual

3. Nudging: Using Behavioral Science to Drive Behavior

People are aspirational: they want to save more money, have life insurance, plan for retirement, and lose those last 10 pounds. Yet their biases, tendencies, and present-day focus keep them from reaching their goals and making the decisions that are best for them. Attend this fascinating session on behavior science to:

- Learn what nudging is
- Lead people toward better decisions that better meet their aspirational goals
- See real-world examples for how behavioral-based design can lead to better outcomes for consumers and companies

NEESHA MATHUR, FMLI, PCS, Director, Head of Behavioral Science and Marketing, Prudential;
Moderator: JENNIFER BURLINGAME, Chief of Staff and (Interim) Head of Multicultural Marketing, Prudential

4. In 10 Years, You'll Never Leave Your Home

Join us for an interactive look into new technology and marketing innovations that will drastically affect both our work and personal lives moving forward. Rob will discuss the opportunities these changes present, and how to take advantage.

ROBERT KNOP, Founder and Chief Executive Officer, Assist You Today; **Moderator: MICHELLE WOODS**, Vice President, Life Marketing, Protective Life

LIMRA WELCOME RECEPTION — 5:00 to 6:00 p.m.



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THURSDAY, MAY 30

BREAKFAST — 7:00 to 8:00 a.m.

GENERAL SESSION — 8:00 to 8:50 a.m.

Connecting With the 21st Century Insurance Consumer



BETH WOOD

*Vice President and Chief Marketing Officer, Individual Markets
Guardian Life Insurance Company*

Consumers are better informed than ever before while managing a significant increase in both solicited and unsolicited marketing messages. Demanding both physical and digital engagement from prospective insurance carriers and their advisors, what are the types of messages and media that break through and inspire action? Through digital transformation, reimagining the client experience and leveraging modern marketing technologies, firms are seeking new approaches to building effective human connections with customers. During this session, we will review several methods being employed by today's insurance companies and top marketers to effectively reach and engage with consumers in the 21st-century.

CREATIVE CONNECTIONS AWARD — 8:50 to 9:15 a.m.

During this special ceremony, Platinum and Gold winners will be awarded in two categories (based on company size). This award recognizes and rewards marketing and creative excellence, innovation and achievement, and highlights best practices in financial services marketing.

BREAK — 9:15 to 9:45 a.m.



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CONCURRENT WORKSHOPS — 9:45 to 10:45 a.m.

5. See With New Eyes: Adjusting the Focus on Consumer Segmentation

The concepts of audience segmentation and persona development aren't new, but are the ways your company builds them effective? This session will focus on one company's effort to design segmentation and personas along dimensions of consumer need, insightful data, and emerging disruptors, so that they can help shape your strategy rather than simply describe your old way of doing business.

ENDRI PANARITI, Director, Metrics and Insights, Prudential Financial; **JEFF TROUSIL**, Director, Research and Insights, Prudential Financial; **Moderator: AZIZA A. ALEXANDER**, Director, ILL Strategy, Prudential Financial

6. Let Them Tell Your Story

Looking to improve the impact of your B2B/B2B2C marketing? Even if your message is right, the messenger (you) may be wrong. Attend this session to learn how companies are using cost-effective digital solutions to capture, share, and celebrate the ideas and best practices from their distributors. You'll discover that the results include strengthening their own brand, motivating action, and driving sales results.

DANIEL GRIESEMER, Second Vice President, Product Marketing, Ohio National; **KRISTA STEVENS**, Sales Development Strategist, Ameritas; **Moderator: MICHELLE WOODS**, Vice President, Life Marketing, Protective Life

7. Real Talk: A Real-Life View of the Advisor Journey Process

Join us for this fun and interactive panel discussion for a look at the advisor journey, including a real-life look at how two financial services companies implemented the journey mapping process. You'll hear examples from your fellow financial service marketers about wins, fails, and tactics on how to get started or push your current journey process further along. Audience participation is accepted and encouraged — please come ready to share your thoughts, questions, and experiences!

KATIE BARTLING, Vice President, Internal Sales and Marketing, Sammons Financial Group; **JENNA HOMAN**, Director of Sales and Distribution, Strategy and Analytics, Nationwide; **Moderator: TODD SILVERHART, Ph.D., LLIF**, Corporate Vice President and Director, Insurance Research, LIMRA

8. Deep Thoughts With Thought Leadership

Everyone wants to provide thought leadership, but may not know where to start. What is thought leadership? What strategies will deliver content that will engage customers? Come listen to our presenters who will answer these questions, provide real-life thought leadership examples, and give you tools you can implement at your organization.

SASHA FRANGER, Director of Thought Leadership, Empower Retirement; **LIANNE WADE**, Account Director, MERGE Boston; **Moderator: MATHEW NELSON**, Marketing Consultant, MassMutual

BREAK — 10:45 to 11:00 a.m.



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CONCURRENT WORKSHOPS — 11:00 a.m. to 12:00 p.m.

9. Disrupting the Disruptors

Join this session to participate in a hands-on experience: You will be hired as CMO at a company that is disrupting our industry and charged with building out their marketing strategy. What new approaches can you come up with when you think differently, and how can we bring those ideas back to our own organizations? Attend this session to reset your brain, think big about what's possible, and explore the biggest disruptors to our industry are.

TIM CALVERT, Partner and Managing Director, Boston Consulting Group; **Moderator: LAURA HAHN**, Director, Customer Insight and Engagement, Guardian Life

10. Driving Relevance and Growth With Multicultural Marketing

Cultural market segments are fueling population and workforce growth, as well as new business creation. While everyone connects better with marketing that is relevant to them, this is particularly true for those who identify with a cultural segment. Attendees of this session will:

- Learn why building a multicultural marketing plan is critical for your company to drive relevance, inclusion, and growth
- Understand why both a total market approach and multicultural focus is important
- Hear case studies on multicultural marketing plan development

FRANCISCA BROWN, Senior Director, African American/Hispanic Market Strategy, Northwestern Mutual; **LAUREL DARING**, Director, Multicultural Marketing, Prudential; **ERIC JACKSON**, Corporate Vice President and Market Manager, New York Life; **Moderator: JENNIFER BURLINGAME**, Chief of Staff and (interim) Head of Multicultural Marketing, Prudential

11. Marketing Team Champions Clarity in a Big Way!

Are you having trouble gaining consensus to execute on your next big idea? Learn how a small, in-house marketing and brand team just did that in their quest for clarity. Follow their journey that made complex products and concepts easier to understand — from how an ad campaign morphed into changing the way they do business, to how they gained support from top leaders to cut through the “jibber jabber” in customer communications.

KORBI FAUST, Assistant Vice President, Director of Creative Services and Engagement Strategy, Symetra; **KATHRYN RILEY**, Assistant Vice President, Corporate Marketing and Brand Development, Symetra; **Moderator: VIVIAN ELBA**, Assistant Director, Group Benefits Marketing, The Hartford

12. Maximizing Your Social and Digital Strategy

What are the most pressing questions about AI (Artificial Intelligence) and its role in CX and marketing? This session will answer key questions about the applicability, immediacy, and results of using AI to uncover new and rich insights, deliver superior customer experiences, and improve campaign results.

NATE MCGRATH, Assistant Vice President, Marketing, LIFE Happens; **Moderator: MICHELLE FISCHBACH**, Product Line Manager, Life, Allianz Life

LUNCHEON — 12:00 to 1:15 p.m.



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CONCURRENT WORKSHOPS — 1:15 to 2:15 p.m.

13. Top 10! ...Maybe 12: Using AI Today for Marketing Insurance

How can building a compelling and memorable story shape marketing strategy that drives business results?

- Understand the importance of storytelling and its impact on decision-making
- How storytelling has proved effective across industries to drive differentiation, profitability, and sales
- Why emotional storytelling is critical for your marketing strategy and brand identity
- Hear real-world case studies and testimonials from your peers during the interactive session

DAVE EDINGTON, Marketing and CX Strategist, IBM Watson Customer Engagement Practice, IBM;

Moderator: TODD SILVERHART, Ph.D., LLIF, Director, Insurance Research, LIMRA

14. Avoiding the ‘Ick’ Factor in Your Target Marketing

Yes, effective target marketing can help your company connect with new customers or recruit diverse talent. But in a charged climate, nuance matters — and even well-intended efforts can backfire, repelling the very audience you were trying to reach. This session will equip you with guidance from experts across our industry on:

- Strategies for developing and vetting your messages and collateral
- Real-world examples of successes, missteps, and lessons learned
- Ideas for repeatable processes that can help you avoid the “ick” factor in your target marketing

DANIEL GRIESEMER, Second Vice President, Product Marketing, Ohio National; **MICHELLE WOODS**, Vice President, Creative Services, Protective Life

15. Don’t Sample Every Social Marketing Solution at the Buffet

There are a lot of social marketing solutions that advisors can leverage — but not all are created equal or for every advisor. Hear how Guardian Life built a digital ecosystem to help financial professionals:

- Learn why developing a core set of social marketing solutions is key
- Understand why some platforms aren’t for every advisor
- See why monetary investments aren’t the only factor to consider when choosing a social marketing solution

NATE ISAACSON, Director, Digital Marketing, Guardian Life; **Moderator: MELISSA YORK**, Senior Marketing Specialist, The Standard

REFRESHMENT BREAK — 2:15 to 2:30 p.m.



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CONCURRENT WORKSHOPS — 2:30 to 3:30 p.m.

16. We Don't Need No Education...or Do We?

No-Cost, Low-Cost Professional Development for Marketers

Enhance your marketing knowledge and make yourself and your team indispensable. During this session we will present alternative sources for marketing learning and professional development, featuring no cost and low cost accessible opportunities. You will leave with a broad list of resources for marketing professional development in the following areas: content development, strategy, digital, multimedia, social media, pr, editorial, design, and project management.

MELISSA YORK, Senior Marketing Specialist, The Standard; **MATT BROWN**, Marketing Specialist, Audience Development, LIMRA; **KARA SHEA**, Marketing Specialist, LOMA; **JOHN ROCCHETTI**, Multi-Media Manager, LIMRA/LOMA; **Moderator: LISA TANEN-LAFONTAINE**, Chief Marketing Officer, LIMRA/LOMA

17. Helping Advisors and Consumers With the Journey Into Retirement

The years immediately before and after retirement represent the most critical period for consumers' financial security — and often the most challenging to navigate. Understanding consumers' actions and outlooks during this period can improve the effectiveness of financial services companies' messaging, planning, services, and resource deployment. Based on recent LIMRA Secure Retirement Institute and Principal Financial research, this session will explore:

- Pre-retiree and retiree "visions" of retirement
- The concerns shaping their outlooks
- Five habits of happiest retirees
- The role of retirement planning and advice

CECILIA SHINER, Associate Research Director, LIMRA Secure Retirement Institute; **TRACEY CLAVELL, CLU, RICP**, Marketing Director, Retirement and Income Solutions, Principal; **Moderator: TODD SILVERHART, Ph.D., LLIF**, Corporate Vice President and Director, Insurance Research, LIMRA

18. Make an Immediate Impact; Simple Steps to Increase Content Value and Maximize Website Rankings

Join this session to quickly boost your search rankings through improvements in page relevance, and execute a content-centric marketing program that respects the (sometimes unexpected) language buyers' use when researching your products and services. The result?

- A content footprint that meets your customer in the now and builds a bridge to your brand when they are ready to buy.
- Improved organic search results.
- The ability to grow your presence with takeaway tips and tools.

JEFF GRILL, Partner, Brainchild; **Co-Moderators: LAURA HAHN**, Director, Customer Insight and Engagement, Guardian; **JANET HOLTON**, Marketing Manager, Modern Woodmen of America

REFRESHMENT BREAK — 3:30 to 3:45 p.m.



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GENERAL SESSION — 3:45 to 5:00 p.m.

Wellness Tips to Recharge Your Day

VICTORIA JUSME

*Programs & Wellness
MIT Recreation*

Work your way through a guided series of stretches, movement, and meditation practices. You'll feel re-energized and will walk away with self-care tools you can use through the rest of your life. Find yourself refreshed and energized for the upcoming inspirational general session with Richard Coffey.

The Seasons of Life — Change, Attitude & Perseverance



RICHARD COFFEY

Richard Coffey, Unlimited

Our lives consist of ever-changing seasons. What was important in the past may not be important now, and what will be important in the future may be different from today. Whichever season you are in, you must find a way to live outside your comfort zone. It's only when you challenge yourself that you will find personal growth and development. Join Richard as he gives you the tools and inspiration to push past your fears, tap into your personal power, create new rituals and standards to move to the next level, and ultimately, improve your personal and professional brand.

THE MARKETING MINGLE — 5:00 to 6:00 p.m.

Sponsored by LIMRA.com, Ascendle, and ISI Language Solutions

Join us for an evening of socializing, networking, and winning! Participate in a LIMRA.com scavenger hunt, enjoy some refreshments, and mingle with some of the best marketing minds in the industry.

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FRIDAY, MAY 31

BREAKFAST — 7:00 to 8:00 a.m.

GENERAL SESSION — 8:00 to 9:00 a.m.

Getting the Right Response Through Behavioral Science Secrets



NANCY HARHUT
Chief Creative Officer
HBT Marketing

Delivering the right message to the right person at the right time can still fail to deliver the right response. Considering these factors is important, but we must also consider the automatic, hardwired ways that people make decisions. Whether it's choosing what to read, whom to trust, or when to buy, behavioral scientists have proven that very often people don't really think — they just react. This is a major opportunity for us as marketers to build our strategies around. In this fascinating, fast-paced general session, you'll discover behavioral science secrets and how they're being successfully applied in real-world, industry examples. Learn how you can easily incorporate behavioral science into your own campaigns to drive results, and leave ready to progress with purpose. To survive, legacy industries such as insurance must adapt — fast. We'll connect the dots, illustrating how new technologies and automation are driving customer expectations and innovation.

GENERAL SESSION — 9:00 to 10:00 a.m.

The Power and Profitability of Optimism



LISA TANZER
President
Life is Good

Lisa shares experiences from Life is Good to help audiences discover their own sense of optimism and uncover a deeper meaning to their work. Lessons on gratitude, openness, and compassion show how simple mindset shifts can transform company culture and customer experiences.

BREAK — 10:00 to 10:15 a.m.

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EXHIBITOR PRIZE DRAWING — 10:15 to 10:30 a.m.

GENERAL SESSION — 10:30 to 11:15 a.m.

Making Progress on Purpose



ERIC T. SONDERGELD, ASA, CFA

*Corporate Vice President and Director
LIMRA*

Our industry is one of relatively few with embedded purpose. Your company's may be to help people save for and live a successful retirement. Or it may be to provide financial support when people get sick or die. Completely fulfilling such missions is not only challenging, but a moving target. Using LIMRA research and other sources, we can better understand if we're making progress towards these goals and what you as marketers can do to get closer.

ADJOURNMENT — 11:15 a.m.



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